2015

SPRING CONFERENCE

The Association of Chief Business Officials

Barreling Forward: Navigating a Changing System

May 18-20, 2015

Hyatt Vineyard Creek Inn, Santa Rosa
MON 5/18

9:00 a.m. – 5:00 p.m.
Conference Check-In/Information Desk Open
Breakfast on Your Own

ALEXANDER VALLEY FOYER
Sponsored by:

10:00 a.m. – 11:15 a.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: GASB68: What Does it Mean for my District?
Panelists: Brandon Harrison, Manager, Vavrinek, Trine, Day & Co. LLP; Ron Gerhard, Vice Chancellor, City College of San Francisco; and Jeff DeFranco, Vice President of Administrative Services, Lake Tahoe Community College

Session Description: With the 2014-15 fiscal year annual audit around the corner, what does your district need to do to prepare for accounting and financial reporting for pensions? The panelists in this session will provide an overview and background as well as reporting impacts of GASB 68 (Governmental Accounting Standards Board Statement No. 68). You will hear an auditor’s perspective on what your district should do to prepare for this change and the impacts on your district’s Statement of Net Position (balance sheet.) Hear from CBO’s on how they are preparing for and addressing the change in the management’s discussion and analysis as well as communicating how this will impact Districts’ Net Position. You will also learn more about when and where you can get a report on your district’s proportionate share of the net pension liability for CalSTRS and CalPERS.

11:15 a.m. – 11:30 a.m.
Refreshment Break

ALEXANDER VALLEY FOYER
Sponsored by:

11:30 a.m. – 12:45 p.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: ADA Transition Plans - What You Need To Know To Protect Your District
Panelists: Sharlene Coleal, Assistant Superintendent, Vice President, Business Services, College of the Canyons; Peter Hardash, Vice Chancellor, Rancho Santiago CCD; and Terry Tao, Partner, AALRR

Session Description: With the recent change in ADA law, the focus of ADA lawsuits has changed from private to public. Community colleges have a unique exposure with expansive facilities open to the public. The key to managing this exposure is the ADA Transition Plan. Learn about the resources available to prepare this document that will identify potential areas to be upgraded, including the cost and development of a workable timeline. Presenters will discuss the difference between Title II - Private (entire facility is subject to scrutiny) and Title III - Public (scrutiny is subject to paths of travel/student programs and services).

12:45 p.m. – 1:30 p.m.
Luncheon and Welcome Address

KNIGHTS VALLEY GARDEN
Sponsored by:

1:00 p.m. – 1:30 p.m.
Welcome Address

1:45 p.m. – 2:45 p.m.
CONCURRENT SESSIONS

OPTION ONE: The CEO/CBO Relationship: The Expectations and Requirements of a Relationship that Must Succeed

ALEXANDER VALLEY 1/2

Panelists: Kindred Murillo, Superintendent-President, Lake Tahoe Community College District; Helen Benjamin, Chancellor, Contra Costa CCD; Jose Ortiz, Chancellor, Peralta CCD; Teresa Scott, Executive Vice Chancellor, Yosemite CCD; Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD; and Sharlene Coleal, Assistant Superintendent, Vice President Business Services, College of the Canyons

Session Description: This panel of district management leaders will discuss the ever-changing expectations of the community college system they must navigate, and how they find ways together to meet those expectations. Both external and internal in nature, the issues include State funding and regulatory changes, as well as providing information and context to local boards, internal committees and represented groups. Whether or not the relationship between a CEO and the CBO is successful can make or break the progress of a district and has everything to do with real Student Success. Hear from these experienced professionals about the best practices and the pitfalls of these mutual roles.

OPTION TWO: Technology Rules: A Good Investment or a Waste of Money?

ALEXANDER VALLEY 3/4

Panelists: Sean Olcott, Manager, BIM Services, Yehudi Gaffen, CEO, and John Turner, Vice President, Marketing, Gafcon Inc.; and Sue Rearic, Vice Chancellor, Business Services, Grossmont-Cuyumaca College

Session Description: You are ready to start your Bond campaign but you find yourself questioning whether or not the effort will actually result in the valuable investment you hope for. Your focus is design and construction, but will your decisions ultimately have a negative impact on your ability to operate and maintain the buildings you're planning? Project governance is in place, but will your financial accounting system help or hinder your ability to appropriately manage Bond funds?

The experiences of four community college bond programs are featured in case studies that will explore capital planning, integrated program controls and BIM for Owners.
Panelists: Steven Crow, Vice President, Business & Financial Affairs, Southwestern CCD; Leigh Sata, Executive Bonds Manager, Solano CCD; and Mark Kelley, Partner, Dannis Wolkoff Kelley

Session Description: Whether you recently passed a bond or are planning one, you need to have a solid plan to build what you promise. This session, featuring seasoned District and legal personnel, will provide a roadmap for each step in a successful construction program, including setting expectations, planning budgets and schedules, choosing delivery systems, and meeting legal requirements. Panelists will provide real world scenarios and useful forms that can streamline your process and be applied now.

Panelists: Christy White, Partner, Tanya Rogers, Partner, and Steven Currie, Manager, Christy White & Associate; and Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD

Session Description: Is there fraud occurring within your organization? While we always hope the answer is no, if you are not taking the steps to diagnose the “fraud temperature”, it may be occurring. A strong internal control environment will include effective monitoring and testing to determine if the original design is still effective. When the controls are no longer working or effective and fraud is suspected or detected, what steps you take next are critical to reaching a resolution.

Panelists: Ann-Marie Gabel, Vice President of Administrative Services, Long Beach CCD and Susan C. Yeager, Administrator, Facilities Planning & Utilization, California Community Colleges Chancellor’s Office

Session Description: This presentation will help you understand California’s Community College Capital Outlay Program. Panelists will discuss how projects are prioritized at the Chancellor’s Office and help you understand how to position your capital outlay projects to effectively compete for limited state funds. Come and learn about how capital outlay projects are categorized, how points are calculated and how leveraging local funds makes projects more competitive!

Panelists: Frances Rogers, Attorney, Liebert Cassidy Whitmore and Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD

Session Description: STRS statutes and regulations have recently been amended to reform the definition of creditable compensation for members of STRS. This impacts those items of compensation that will be credited to member retirement. Community colleges must take action prior to 1/1/16 to reform employment contracts and salary tables to ensure that creditable compensation is not lost as part of the legislative and regulatory changes. This session will focus on the legal reform, what colleges should be doing now and in the future, and other STRS changes that may be on the horizon.

Panelists: Stephen McLoughlin, Associate and Aaron O’Donnell, Partner, AALRR; and Cindy Vyskocil, Vice Chancellor, Human Resources, Coast CCD

Session Description: This session is intended to provide a starting place for those unfamiliar with Title IX, as well as those who may need an update on recent changes to the law and how it is currently being enforced. Title IX includes a broad range of laws, regulations, and requirements aimed at eliminating sexual violence, harassment and discrimination from our nation’s education system. To comply with these laws, schools are required to develop and implement a comprehensive procedure to address these abuses and make sure all people involved with the school, from Chancellors to students and support staff, are aware of the Title IX requirements and armed with the knowledge necessary to help meet the compliance obligations.

The federal government recently launched a national campaign to reexamine how sexual misconduct on campus is addressed and the resulting scrutiny has lead to a number of high profile incidents that all colleges should take note of. Is your district adequately meeting the requirements of Title IX and related laws, such as the Clery Act?

This workshop will provide a summary of the law and provide a detailed analysis of some of the recent high profile investigations as well as related regulations that dictate how sexual misconduct must be handled.
Panelists will discuss Title IX compliance which depends on the active participation of all school personnel.

10:30 a.m. – 10:45 a.m.
Refreshment Break
ALEXANDER VALLEY FOYER
Sponsored by:

10:45 a.m. – 11:45 a.m.
Keynote Presentation:
ALEXANDER VALLEY 1/2

Topic: Ethical Wisdom: Doing the Right Thing in Uncertain Times

Presenter: Jack Gilbert

Dr. Jack Gilbert is a program director and clinical associate professor at Arizona State University (ASU), and a Lincoln Scholar in the Lincoln Center for Applied Ethics. He is a noted expert in organizational and personal integrity, innovation leadership, and large-scale change. Among other roles, Jack has consulted to organizations large and small in many fields including financial services.

He is the author of Strengthening Ethical Wisdom (2007) and co-author of The Heart of Leadership (2010) both published by the American Hospital Association Press. He is also the author of Gilbert’s Fables (2009).

Jack holds his doctorate from The George Washington University in Washington, D.C. where his dissertation focused on the role of ethics in decision-making for senior executives.

12:00 p.m. – 12:45 p.m.
Lunch
KNIGHTS VALLEY GARDEN
Sponsored by:

1:00 p.m. – 2:00 p.m.
CONCURRENT SESSIONS

OPTION ONE: Phoenix Rising: Responding When your Non-Profit Foundation Implodes
ALEXANDER VALLEY 3/4

Panelists: Greg Nelson, Vice President Finance & College Operations, College of Marin and Randy Parent, Attorney, Liebert Cassidy Whitmore

Session Description: What do you do if your nonprofit foundation cannot meet its financial obligations to be self-sufficient or if the foundation board stakes out a position in opposition to District’s Board of Trustees and President? Now, what would happen if the nonprofit completely implodes?

This occurred in 2012 when the College of Marin Foundation imploded in a very public display. The College of Marin Foundation board of directors decided they did not trust the District’s Board of Trustees or the Superintendent/President based on an irrational fear that the District was going to “steal” the Foundation’s money. Foundation Board members spent significant restricted funds on operating expenses and then they all resigned in an open letter to the press and the attorney general.

To rebuild its fundraising capacity, the District has chosen to bring its development activities in house, rather than resurrect the old foundation or start a new nonprofit. The IRS recently approved the District’s application for tax exempt status under section 501(c) (3) of the internal revenue code, and the strategy is rapidly paying dividends.

The citizens of Marin County are now supporting the District directly rather than through an affiliated nonprofit organization. Randy and Greg will share the story, the lessons learned, and will discuss the District’s rationale for going in this new and exciting direction.

OPTION TWO: Barreling Forward Toward Institutional Effectiveness: Technical Assistance Teams and What to Expect
ALEXANDER VALLEY 1/2

Panelists: Theresa Tena, Vice Chancellor Institutional Effectiveness, Chancellor’s Office; Dr. Barry Gribbons, Deputy Chancellor, College of the Canyons; Dr. Matthew Lee, IEPI Project Director; Mario Rodriguez, Assistant Vice Chancellor Fiscal Services, Chancellor’s Office; and Davit Khachatryan, Vice President Administrative Services, Irvine Valley College

Session Description: The Institutional Effectiveness Partnership Initiative (IEPI) is a collaborative effort to help advance an institution’s ability to serve students. Through the dedicated work of teams of volunteer technical experts (Partnership Resource Teams—PRTs), the Initiative will respond to a college’s call for assistance by focusing on specific challenges to progress as outlined by the college. This is one of several ways in which IEPI differs from the accrediting process and serves as an essential resource for the overall success of a college in meeting accreditation expectations.

You’ll hear about how the process can work for your college as they present an overview of the technical assistance process and how your district can request this opportunity. Imagine, finally addressing and overcoming some of the most difficult barriers to progress facing your college through a collaborative process!

In addition to the technical assistance process, the panel will describe additional resources that will be available through regional training; and discuss how colleges/districts can establish goals for the framework of indicators. This session will result in a better understanding of the larger context for overall higher education goal setting, and it will clarify how the IEPI process compares with the accreditation process and illuminate the service of partnership resource team members and how you might get involved as a member of a technical assistance team.

2:00 p.m. – 2:15 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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2:15 p.m. – 3:15 p.m.
General Session
ALEXANDER VALLEY 1/2

Topic: Sacred Cows or Obstacles to Progress: Reconsidering Statutory and Regulatory Restrictions on Budget Allocation—Can We Do Better?”

Panelist: Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD; David Morse, President, ASCCC; and Willy Duncan, President, Sierra College

Session Description: The various statutory and regulatory requirements that dictate or restrict the ways in which California community colleges may allocate their budgets can be a major source of contention on our campuses and in our system. Worse yet, many of these statutory and regulatory requirements are decades old and conflict with each other, creating unintended consequences or conflicting challenges.

Many administrators advocate for greater flexibility when allocating state revenues in college budgets, whereas many faculty see such requirements as the 50% Law and the Faculty Obligation Number...
as essential protections. Could we develop a more effective way to address budgetary concerns and needs that would satisfy all concerned parties? Join us for an exploration of the issues surrounding this topic and identifying possible directions for the future as ACBO, ACCCA and ASCCC work together to identify solutions.

3:15 p.m. – 3:30 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
Sponsored by:

3:30 p.m. – 4:45 p.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Acknowledging and Managing Stress: Taking Care of Yourself and Your Team

Panelists: Sue Brandy, LCSW

Session Description: This session is an overview that will define the many forms of stress and how it affects each of us, and will focus particularly on Community College Administrators. Along with the unique pressures of "critical incident" stress and management, the emphasis will be on personal stress and will provide techniques you can use to manage the impact of your stress.

Our presenter will explore the mounting research of the power of mindfulness on mitigating stress in the lives of athletes, law enforcement officers, business leaders and people in all walks of life. Experiential exercises will give a brief glimpse into mindfulness and other stress management techniques.

4:45 p.m. – 5:00 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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5:00 p.m. – 6:00 p.m.
CLOSED GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: ACBO SEMI-ANNUAL ASSOCIATION MEETING
(This meeting is for college/district business officials only.)

Panelists: Fred Williams, President, ACBO and Executive Vice Chancellor, Finance, North Orange CCD (moderator) and the ACBO Board of Directors

Session Description: This session is the semi-annual meeting of ACBO—the Association of Chief Business Officials. ALL college/district staff attending the conference are members of the Association and are invited to attend this business meeting. Come meet your elected ACBO representatives and hear them report on a wide range of issues.

Information will be provided on the progress of various ACBO Task Forces and Workgroups that address critical business and fiscal issues on behalf of all 72 districts. The meeting agenda will also include a review of significant actions taken by the ACBO Board since the last semi-annual Association meeting in October 2014. You’ll hear about the progress made on the Association’s objectives to achieve strategic goals, and planned activities for the 2015-16 operating year as they relate to the ACBO ongoing Strategic Plan.

6:00 p.m. – 7:00 p.m.
Reception
This reception will include complimentary wine tasting from the award winning Shone Farms, brought to you by Santa Rosa Junior College.

KNIGHTS VALLEY GARDEN

Sponsored by:

7:00 p.m.
Dinner on Your Own

WED5/20

8:00 a.m. – 10:00 a.m.
Conference Check-In/Information Desk Open
ALEXANDER VALLEY FOYER

8:00 a.m. – 8:30 a.m.
Networking Buffet Breakfast
ALEXANDER VALLEY FOYER

8:30 a.m. – 10:00 a.m.
CLOSED GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Semi-Annual Report of the Chancellor’s Office and System Update

The Chancellor’s Office executive team will be on hand to update attendees on the latest with regard to Budget, apportionment issues, the FON and other fiscal matters. This will be followed by a presentation from members of the Workgroup on Fiscal affairs with information regarding the Growth formula, the $125 million base allocation recommendation and other issues the Workgroup has addressed since our last conference report. This is to be followed by a comprehensive Q&A so all your questions and concerns can be addressed.

10:00 a.m. – 10:15 a.m.
Refreshment Break
ALEXANDER VALLEY FOYER
Sponsored by:

10:15 a.m. – 11:30 a.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Legislation, Policy and Advocacy: An Organizational Perspective

Presenters: Michelle McKay Underwood, Legislative Director, School Services of California, Inc. and ACCCA Legislative Advocate and Thuy Thi Nguyen, Interim President and CEO, Community College League of California (CCLC)

Session Description: Following the System Update by the Chancellor’s Office, our friends from the League and ACCCA will weigh in with a discussion of some of the political realities facing community colleges in the current session and beyond. Critical policy issues, legislation and strategies for effectively advocating for districts as well as their students, staff and administrators will be discussed.

11:30 a.m.
Conference Adjourns

May 18-20, 2015
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ivory.li@pj.com
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RBC Capital Markets
Rod Carter, Managing Director
777 South Figueroa Street, Suite 850
Los Angeles, CA 90017
(213) 362-4133
roderick.carter@rbccm.com
www.rbccm.com

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Joanna Bowes, Managing Director
1300 Clay St., Ste 1000
Oakland, CA 94612
(510) 208-8219
jb bowes@knninc.com
www.knninc.com

Company Bio: Established in 1982, KNN Public Finance provides independent finance advisory services to community colleges and other California local government agencies. The core of our businesses are strategic and capital planning, technical analysis, risk analysis, feasibility analysis, debt issuance, credit rating strategy and management, OPEB analysis, and development of debt and investment policy and best practices. Ms. Bowes, as Managing Director and Head of the Education Group, focuses on community colleges, bringing extensive experience with general obligation bonds, COPs, TRANS, OPEB, election support, and debt service restructuring.
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www.aalrr.com
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AECOM
300 California St., Ste 400
San Francisco, CA 94104
(415) 745-0276
gary.moriarty@aecom.com
www.aecom.com
Company Bio: AECOM provides comprehensive planning, design, program management and construction management services to California CCD’s.

Christy White Associates
Christy White, CPA, President
548 Olive Street
San Diego, CA 92103
(619) 270-8222
cwhite@christywhite.com
www.christywhite.com
Company Bio: Christy White Associates provides quality audit services to local government and nonprofit agencies.

Crowe Horwath
Tina Treis, Partner
400 Capitol Mall Ste. 1400
Sacramento, CA 95814
(916) 441-1000
tina.treis@crowehorwath.com
www.crowehorwath.com
Company Bio: Crowe Horwath LLP is one of the largest public accounting, consulting, and technology firms in the U.S.

Keygent Advisors
Chet Wang, Managing Director
999 N. Sepulveda Blvd. Suite 500
El Segundo, CA 90245
Office: (310) 322-4222
Direct: (310) 801-6331
chet.wang@keygentcorp.com
www.keygentcorp.com
Company Bio: Keygent is a financial advisory firm focused on serving California education districts on bond programs.

Little Diversified Architectural Consulting Inc.
Sharon Bolle, Director of Client Relations
300 North Lone Hill Avenue, Suite 110
San Dimas, CA 91773
Office: (909) 698-1464
Direct: (909) 631-3902
sharon.bolle@littleonline.com
www.Littleonline.com

School Project for Utility Rate Reduction (SPURR)
Michael Rochman, Managing Director
1850 Gateway Blvd, Ste 235, Concord, CA 94520
Direct: (925) 609-1140
Office: (925) 743-1292
rochmanM@spurr.org
www.spurr.org
Company Bio: SPURR: The School Project for Utility Rate Reduction (SPURR), a California joint powers authority, aggregates purchasing in the procurement of utilities for school districts, community colleges, and county offices of education.

WLC Architects, Inc.
Leo Ray-Lynch, Principal
Mark Graham, Principal
8163 Rochester Ave Suite 100
Rancho Cucamonga, CA 91730
(909) 987-0909
lraylynch@wlcaitects.com
www.wlcarchitects.com
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www.stifel.com
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Michael Rochman, Managing Director
1850 Gateway Blvd, Ste 235, Concord, CA 94520
Direct: (925) 609-1140
Office: (925) 743-1292
rochmanM@spurr.org
www.spurr.org
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Leo Ray-Lynch, Principal
Mark Graham, Principal
8163 Rochester Ave Suite 100
Rancho Cucamonga, CA 91730
(909) 987-0909
lraylynch@wlcaitects.com
www.wlcarchitects.com
Company Bio: As a client-focused firm of talented professionals, WLC Architects is passionate about creating timeless design.

AECOM
300 California St., Ste 400
San Francisco, CA 94104
(415) 745-0276
gary.moriarty@aecom.com
www.aecom.com
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Chet Wang, Managing Director
999 N. Sepulveda Blvd. Suite 500
El Segundo, CA 90245
Office: (310) 322-4222
Direct: (310) 801-6331
chet.wang@keygentcorp.com
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Sharon Bolle, Director of Client Relations
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San Dimas, CA 91773
Office: (909) 698-1464
Direct: (909) 631-3902
sharon.bolle@littleonline.com
www.Littleonline.com

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Direct: (925) 609-1140
Office: (925) 743-1292
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Leo Ray-Lynch, Principal
Mark Graham, Principal
8163 Rochester Ave Suite 100
Rancho Cucamonga, CA 91730
(909) 987-0909
lraylynch@wlcaitects.com
www.wlcarchitects.com
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AECOM
300 California St., Ste 400
San Francisco, CA 94104
(415) 745-0276
gary.moriarty@aecom.com
www.aecom.com
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Chet Wang, Managing Director
999 N. Sepulveda Blvd. Suite 500
El Segundo, CA 90245
Office: (310) 322-4222
Direct: (310) 801-6331
chet.wang@keygentcorp.com
www.keygentcorp.com
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Sharon Bolle, Director of Client Relations
300 North Lone Hill Avenue, Suite 110
San Dimas, CA 91773
Office: (909) 698-1464
Direct: (909) 631-3902
sharon.bolle@littleonline.com
www.Littleonline.com
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Eric O’Leary, Sr. Vice President  
4350 Von Karman Avenue, Suite 100  
Newport Beach, CA 92660  
(800) 540-6369  
eoleary@pars.org  
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Tito Ibarrola, Vice President  
445 S. Figueroa Street  
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(213) 236-4243  
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Ann Kennedy, President  
PO Box 1111  
North Fork, CA 93564  
(559) 877-7800  
akennedy@akennedyngroup.com  
www.akennedyngroup.com

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787 Spreeks Ave  
Manteca, CA 95336  
(209) 263-1677  
carmen.o@americanmodular.com  
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Citi
Victor Andrade, Director  
444 S. Flower Street, 27th Floor  
Los Angeles, CA 90071  
(213) 486-7144  
victor.m.andrade.jr@citi.com  
www.citigroup.com

Cambridge West Partnership, LLC
Joyce Black, Senior Partner  
14471 Chambers Road Ste. 260  
Tustin, CA 92780  
(949) 300-0580  
jmblack1@earthlink.net  
www.cambridgewestpartnership.com

Compass Energy Solutions
Vance Williams, VP Western Region  
301 9th St Ste. 411  
Redlands, CA 92374  
(909) 518-5647  
vwilliams@cesolutionslp.com  
www.cesolutionslp.com

Dannis Woliver Kelley
Mark Kelley, Attorney  
275 Battery St Ste. 1150  
San Francisco, CA 94111  
(415) 543-4111  
mkelley@DWKesq.com  
www.DWKesq.com

EMCOR Services, Mesa Energy Systems
Shaun Avyazi, Director of Energy Services  
2 Cromwell  
Irvine, CA 92618  
(949) 451-9352  
savyazi@emcor.net  
www.mesaenergy.com

Gafcon
Yehudi “Gaf” Gaffin, CEO  
5960 Cornerstone Court West, Suite100  
San Diego, CA 92121  
(858) 875-0010  
gaf@gafcon.com  
www.gafcon.com

Harris & Associates
Harris & Associates  
Allyson Gipson, VP Education  
Harris & Associates  
1401 Willow Pass Road, Suite 500  
Concord, CA 94520  
(925) 827-4900  
allyson.gipson@weareharris.com  
www.weareharris.com

J.P. Morgan Chase
J.P. Morgan Chase  
Betsy O’Brien, Vice President  
560 Mission Street, 4FL  
San Francisco, CA 94105  
(415) 515-8803  
elizabeth.c.obrien@jpmorgan.com  
www.jpmorgan.com

Liebert Cassidy Whitmore
Cynthia Weldon, Director, Marketing and Training  
6035 West Century Blvd, 5th Floor  
Los Angeles, CA 90045  
(310) 981-2000  
cweldon@lcwlegal.com  
www.lcwlegal.com

Rice Financial Products
Rice Financial Products  
Hector Reyes-Erazo, Vice President  
55 Broad Street, 27th Floor  
New York, NY 10004  
(415) 307-1919  
hectorreyes-erazo@ricefin.com  
www.ricefin.com

TouchNet
Cylinda Duran, Regional Sales Manager  
15320 College Blvd.  
Lenexa, KS 66219  
(913) 599-6699  
cylinda.duran@touchnet.com  
www.touchnet.com

Vanir Construction Management, Inc.
Chuck Kluenker  
4540 Duckhorn Dr., Ste 300  
Sacramento, CA 95834  
(916) 575-8888  
chuck.kluenker@vanir.com  
www.vanir.com